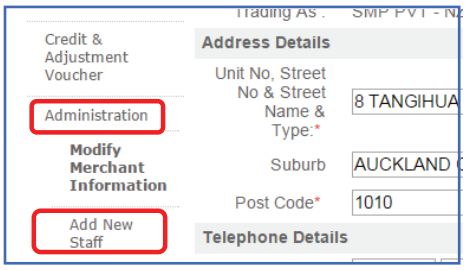
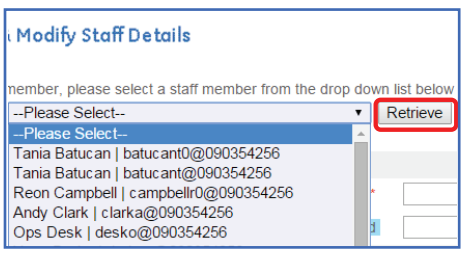
User maintenance
Quick Reference Guide

Purpose of this document This guide is to help merchants with adding and deleting new staff to the Merchant Portal and resetting passwords.

Adding new users

Step	Action
1	 1. Log in to Merchant Portal >> https://merchantportal.gemfinance.co.nz 2. Click on **Administration** on the left hand side-bar. 3. Click on **Add New Staff** on the left hand side-bar.
2	1. Enter in the following details: **Field** / **Action** First Name, Last Name — Enter the user's first and last name Password Temporary — Type the word Password into this field Telephone No, Mobile No and Email address — Not mandatory 2. Tick the applicable boxes if the user needs additional access (generally sales staff will not have additional access, no boxes ticked). All staff have access to Deal Handler, *New Applications*, *Add On Sales*, and *eSalesVouchers.* 3. Click on **Register User**. **Result:** The *Add New Staff Confirmation* screen displays with the User Id, First Name, Last Name and Staff Access Level. 4. Give the user their User Id and default password (Password). Once the user has logged in they will be prompted to change their password using the password criteria (minimum of 8 characters, start and end with a letter and contain at least one number).

Password reset/modify or delete users

Step	Action
1	1. Follow action 1 and 2 in Step 1 of *Adding New Users.* 2. Click on **Password Reset & Modify Staff Details** on the left hand side-bar.
2	 1. Click on the drop down box arrow to select staff member name and click on **Retrieve.** 2. Continue with the applicable step below: • To reset a password type Password into the *New Password* field. • To update staff details or access edit the applicable fields/ check boxes. • To delete a staff member click on **Delete Staff Member** after retrieving the staff details in Step 1. 3. Click on **Update Details.**